

Standard Operating Procedure

Title:

Description: Creating a CPO Position and Assigning

Relationships to the Position

SOP Number	SOP:AA-XX
	(where AA is abbreviation to mapping of main heading of outline for SOPs and XX is the number within the SOP)
Version	1.0
Creation Date	3/5/2009
Author(s)	Jen Schroeder
Last Update Date	
Last Updated By	

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1.0 Purpose of SOP

1.1 Intended Audience

All bureaus

1.2 Collaboration Team

Identify who collaborated on the development of the SOP and organization

Name	Organization
Rhonda Watkins	FBMS
Ronald Hatter	FBMS
Jennifer Schroeder	FBMS

1.3 Review Team

Identify who reviewed the SOP, Role, and Approved Date

Name	Role	Approved Date
Rhonda Watkins	FBMS PMO Property Team	
Rayleen Cruz	FBMS PMO Property Team	
Bill Bricker	FBMS PMO Property Team	
Ronald Hatter	FBMS	

1.4 Definition of Terms

Include definition of terms if appropriate

Terminology	Description
BLM	Bureau of Land Management
OSM	Office of Surface Mining
MMS	Minerals Management Service

1.5 Assumptions, Dependencies, and Constraints

N/A

1.6 Change / Version Control

Change and version control will be updated by both O&M and Deployment teams. CR's (both PSL and DSL) that impact the SOP should be captured as well.

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No .	Date	Object	Description of change	Name

2.0 Standard Operating Procedure

2.1 Process Description

There are times when a new position must be created for a CPO, APO, Project Manager or Fleet Manager. The position must be created within the FBMS Mini Master system. In addition to creating the position, the position must also have all relationships established in order for it to work properly. These relationships may include some or all of the following depending upon the position that is being created.

- A003 Belongs to
- A008 Holder
- A012 Manages
- A002 Reports to
- B007 Described by

2.2 When the Process is Used

When a new CPO APO, PM or FM is required or when a CPO APO, PM or FM is leaving and new one must be assigned.

2.3 Related Processes and other References

PP01 Maintain HR Object.

2.4 Who is involved in the Process

- Property person in charge of maintaining the HR Mini Master Record and its relationship of CE, CPO, APO, PM and FM.
- Bureau HR Mini Master Administrator

2.5 Transactions used in the Process

Create New Org units and Positions

Use the following menu path(s) to begin this transaction:

• Select PROPERTY tab → Property Org Home tab → Create New Org Units and Positions folder to go to the Create New Org Units and Positions screen.

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3.0 Process Flow

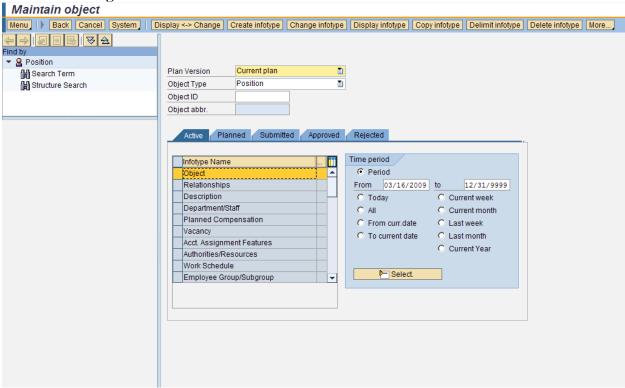
N/A

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Create New Org units and Positions Initial Screen



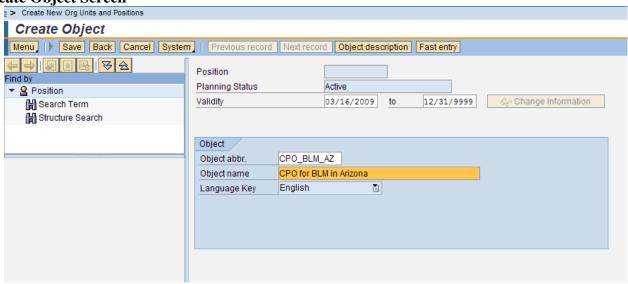
- 1. Click **Position** from the drop down menu in the **Object Type** field
- 2. Highlight the **Object** line item that appears under the **Infotype Name** list
- 3. Click Create infotype to create a new **Position**.

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Create Object Screen



As required, complete the following fields:

Field Name	R/O/C	Description
Validity	R	Note: The validity begin date in the FBMS system will default to the current date which can be changed if desired. The to date defaults to 12/31/9999, which should remain as is. Example: 03/16/2009
Object abbr.	R	Short abbreviation for the Position. Example: CPO_BLM_AZ
Object name	R	Full description of the Position. Example: CPO for BLM in Arizona

- 4. Click Save to save your entries
- 5. You have created a new CPO position for BLM Arizona. Now you need to assign relationships to the position. These relationships include:

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- The Organizational Unit the CPO will belong to
- The APO the CPO will Report to
- The job the position is described by (CPO Job)
- The Person that will hold the New CPO Position

•

The next steps demonstrate how to add a newly created position to an Organizational Unit.

Essential Relationship Relationships Screen Essential relationship Relationships Menu | Save Back Cancel System | Previous record Next record Object description Fast entry Allowed relationships 羅 服 圖 ▼ ☆ Position CPO_BLM_AZ CPO for BLM in Arizona Planning Status Active 🕶 🤮 Position Search Term Valid from 12/31/9999 & Change Information 03/16/2009 to Structure Search Relationships A 003 Belongs to Relationship type/relationship Related Object Type of related object Organizational unit ı ID of related object 50000588 Abbreviation Name Priority

As required, complete/review the following fields:

Field Name	R/O/C	Description	
RelationshipType/Relationship	R	Identifies the type of relationship you are establishing. In this example we are linking the position we created to the Organizational Unit that it will belong to. Example: A 003 for belongs to	
ID of related object	R	All Positions must be linked to an Organizational Unit – Cost Center. The Id for the Related Object in this case is an Organizational Unit that already exists.	
		To find the correct organizational unit to link the Position to simply use the search feature or the structure search and click on the drop down menu to search for the organizational structure. Double-click on the correct organizational structure.	
		Example: 50000250	

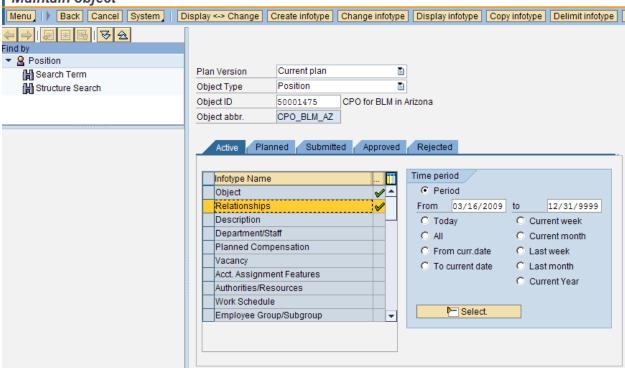
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Click Save the Save button to save your entries. You have created the position and where that 6. position relates to within the Organizational Structure. Next you must continue to develop the relationships with an APO, a person that holds this position and is described by a job title.

Maintain Object Screen Maintain object Find by



- 7. Highlight the **Relationship** line item that appears under the **Infotype Name** list.
- Click Create infotype to establish the relationships of this new position. 8.

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The next steps demonstrate how to add a newly created position to the APO they will report to.

Create Relationships Screen Create Relationships Menu | Save Back Cancel System | Previous record Next record Object description Fast entry Allowed relationships ⊞ 등 ☆ Position CPO_BLM_AZ CPO for BLM in Arizona Find by Planning Status Active 🕶 🤮 Position Search Term Valid from 03/16/2009 to 12/31/9999 & Change Information Structure Search Relationships Relationship type/relationship A 002 Related Object Type of related object Position ı ID of related object 50001309 Abbreviation Name Priority Weighting

As required, complete/review the following fields:

Field Name	R/O/C	Description
RelationshipType/Relationship	R	Identifies the type of relationship you are establishing. In this example we are linking the CPO position we created to the APO that they will report to. Example: A 002 for reports to
ID of related object	R	All CPO Positions must be linked to an APO. The Id for the Related Object in this case is an APO that already exists. To find the correct APO to link the Position to simply use the search feature or structure search and click on the drop down menu to search for the APO. Double-click on the correct APO. Example: 50001309

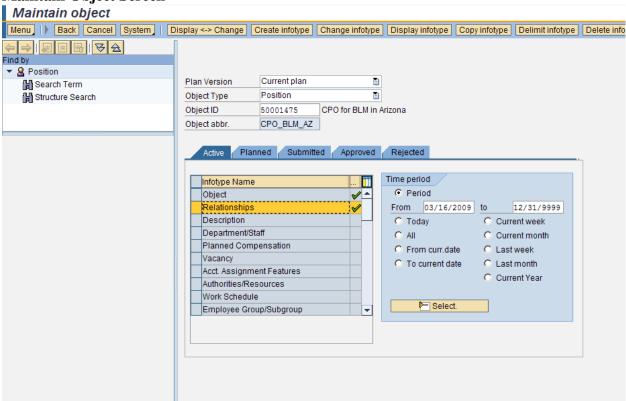
9. Click Save to save your entries.

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- 10. Highlight the **Relationship** line item that appears under the **Infotype Name** list
- 11. Click Create infotype to establish the relationships of this new position.

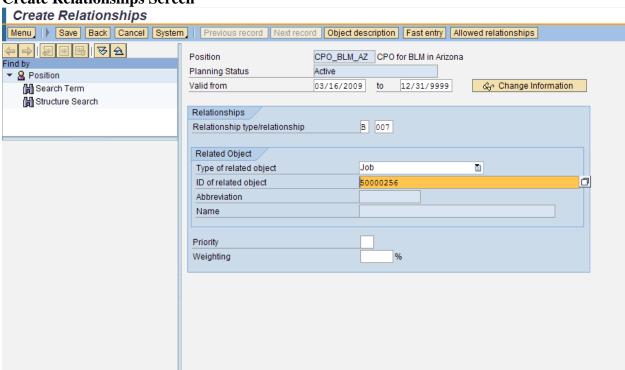
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The next steps demonstrate how to add a newly created position to the CPO job they are described by.

Create Relationships Screen



As required, complete/review the following fields:

Field Name	R/O/C	Description
RelationshipType/Relationship		Identifies the type of relationship you are establishing. In this example we are linking the CPO position to the CPO job that it is described by
		Example: B 007 for Described by

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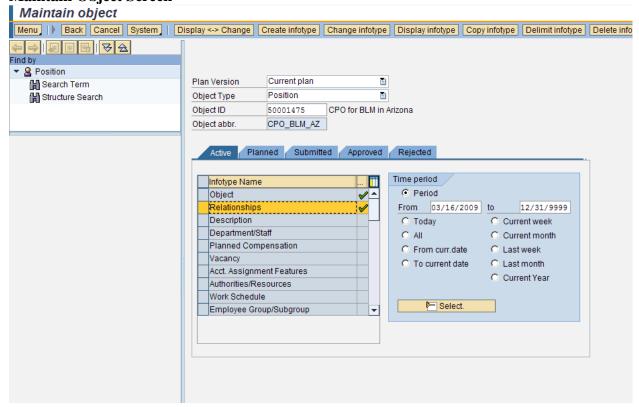


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Field Name	R/O/C	Description
ID of related object	R	All Positions must be linked to a Job. The Id for the Related Object in this case is a CPO job that already exists.
		To find the correct CPO job to link the Position to simply use the search feature or structure search and click on the drop down menu to search for the CPO job. Double-click on the correct CPO job.
		Example: CPO Job50000052
		The following are additional jobs that can be assigned to:
		APO Job - 50000051
		CE Job - 50000050
		FM Job – 50000053
		PM Job - 50000054

12. Click Save to save your entries.

Maintain Object Screen



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13. Highlight the **Relationship** line item that appears under the **Infotype Name** list

14. Click Create infotype to establish the relationships of this new position.

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The next steps demonstrate how to add a newly created position to the person that will hold the position.

Create Relationships Screen Create Relationships Menu | Save | Back | Cancel | System | Previous record | Next record | Object description | Fast entry | Allowed relationships Position CPO_BLM_AZ CPO for BLM in Arizona Planning Status ▼ 🤮 Position Valid from 03/16/2009 to 12/31/9999 & Change Information Search Term Structure Search Relationships Relationship type/relationship A 008 Related Object Person Ē Type of related object ID of related object 40001234 Abbreviation Name Priority Weighting

As required, complete/review the following fields:

Field Name	R/O/C	Description
RelationshipType/Relationship	R	Identifies the type of relationship you are establishing. In this example we are linking the CPO position to the person that will hold the job. Example: A 008 for Holder
ID of related object	R	The Id for the Related Object in this case is a Person that already exists in the system. To find the correct person to link the Position to simply use the search feature or structure search and click on the drop down menu to search for the employee number. Double-click on the correct employee number Remember, in most cases this will be a DOI employee number Example: DOI Employee Number 40001234

- 15. Click Save to save your entries.
- 16. You have successfully created a new CPO position and established its relations with the Organization Unit, Job, APO and person assigned to the new CPO position.

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You may not have to go through all these step if the position is already created or a user is a holder of the position already. If you need to reassign a CPO to an APO you would only do certain steps. Such as, changing the APO number they report to.

4.0 Troubleshooting/Common Errors

• Error message/Action/Examples – common transaction errors, BP questions

Error	Description	Resolution

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5.0 SOP Approval

Besides the relevant deployment and O&M team members (approvals noted in previous section), SOP's should be reviewed and approved by the BP Team lead, and the Production Support lead.

Name	Role	Approved Date
	FBMS PMO – Business	
	Process Team Lead	
	FBMS PMO – Production	
	Support Manager	

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